

Guidelines for Completing and Submitting the McREL Spreadsheet

There have been some challenges across the state with updating the LEA/Charter School spreadsheet for the online tool. Review the guidelines below on how to best keep your spreadsheet up-to-date and error-free when submitting changes to McREL.

Spreadsheets are used to import personnel within each school district. There are five tabs within each spreadsheet. To avoid delays in processing revision, addition, and/or deletion requests, be sure to read the instructions (within the spreadsheet) entirely, before entering data and submitting via email.

Instructions

- All personnel changes will be made via the spreadsheet.
- The McREL spreadsheet cannot be altered in any manner. What this means is that do not add any new columns, no changing of the order or the appearance of the tabs, and no renaming of column/row headers before sending to McREL.
- The entire sheet and file **must** remain intact. As personnel changes occur you will either add or remove a specific row. With each import the entire table is overwritten. Failure to keep current personnel on the spreadsheet and showing only new employees will cause all employees, except the new ones to become deactivated – losing access to all observations in the database.
- The columns on each sheet **must** remain in place. It is not necessary to put in the job title or Salutation title for any one person but the column must remain in place. When a table is updated, it is done in full from left to right. If a column is missing it will populate the wrong fields with the wrong information.

Sites

- Site ID's that are listed for personnel must be populated on the Sites sheet tab. Otherwise, the upload will fail.
- Sites worksheet must list all of the schools in your district. The Site ID number should be the school code/number that has been identified for your individual buildings. You will use the Site ID numbers in each of the worksheets to "assign" people appropriately.
- Assigning users to more than one school can be accomplished by adding a second row with the other school(s) site ID(s).

Dist. Admin.

District Administrators:

- Dist. Admin. worksheet should include all district administrators. An administrator has full access to view all data for the entire district.

Principals AP

Principals and Assistant Principals (If applicable to your contract):

- The Principals_AP worksheet should include all of the principals and assistant principals. The principal has access to only the data at their particular site(s).

Teachers

Teachers (If applicable to your contract):

- The Teachers worksheet should include all of the teachers. The principal has access to only the data at their particular site(s).

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Important Reminders:

- Do not enter a user on the worksheet without complete information
- Delete the entire row when removing a user from the worksheet
- In the body of the e-mail note which worksheet(s) need to be imported, i.e., Sites, Dist Admin, Principal_AP, Teachers
- Do not customize the spreadsheet in any manner – i.e., hidden macros, deleting columns, etc.
- Please double check your spreadsheet for accuracy before sending.
- Spreadsheets with errors will be rejected causing a delay in the process of getting users on the system.
- Please do not send more than one spreadsheet per week
- Imports usually take 48 hours to process. If you have an emergency, please let us know and we will do our best to accommodate your needs.
- Populate the e-mail addresses for all individuals. **If e-mail addresses are missing or typed incorrectly the users will not have the ability to receive email notifications of upcoming observations.**

Always send your updated spreadsheet to customercare@mcrel.org. By doing so, this task will be automatically captured in our ticketing system and you will receive an e-mail with a ticket number associated with the task.